

RESEARCH ON MARKET TRENDS AND CONSUMER BEHAVIOR IN MALE GROOMING PRODUCTS (ESPECIALLY FACE CLEANSER CATEGORY) IN INDONESIA

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Abstract— *There is an emerging trend of male who also concern about their looks and appearance, not in a feminine way, but more to that now they are realizing that male have different needs compare to female. This trend is happening across the globe, including Indonesia. Nielsen's data shows 13.5% growth of the Indonesian market value of male grooming products from 2010 to 2011, growth on household expenditure, higher purchase frequency and volume per trip on male grooming product. Nielsen's home panel data also shown that among all personal care categories, the growth mostly comes from male segment, especially from the face cleanser category followed by shampoo. While these significant growth happened on the male grooming segment until 2010, there was a survey conducted by Maxus 3D Data in 2011 stated that almost half (41%) of the Indonesian male are currently still using the facial cleanser for female. Relating these two contradictory facts, it seems that this will be an issue for all manufacturers which already launched the specific male products to the market because they will not accept maximum profit. This final project purposes is to find out first the trend and male consumer behavior towards face cleansers product, identifying why there are still some men using the non male brands although there are many specific product for male available and identify key success factors that facial cleansers brands must consider to succeed with male consumers. There are three methods to answer those questions, first is literature review on consumer behavior, branding, and the current condition of Indonesian male grooming market – specifically face cleanser category. The second one is data collecting using quantitative (questionnaire) and quantitative (FGD and expert interview) methods and by doing the market observation. The results shows that face cleansers is a very potential market in Indonesia and almost 80% of the respondents are using the category nowadays. Before companies actively playing on this face cleansers male category, brand is not considered as an important element. Male will use any brands available at their home as long as it is able to solve their skin problems. Now, higher advertising spending on this category is actually seen, mainly to increase the consumer's awareness. Comparing the Maxus 3D Data 2011 with the study result, it seems that more and more male are using the male brands although the increment is not significant. Those who are still using the non male brands find there is no need to use specific male brands as long as their current brands are effective and suitable for their skin. The product is also already available at their home so that there is no need to spend additional money for buying other product. The recommendation from significant others are also affecting their decision making process. From the small segmentation, observed that there are also some differences in terms of place of purchase preferences, brand consideration, brand endorsers, and occasions of using face cleansers product among the upper social economic class versus lower economic class consumers. In terms of brand preference, Ponds, Biore Men, L'oreal Men Expert and Vaseline Men are the 4 top brands which doing well in terms of level of usage among consumers with different strong perception correlating with each of them. One product image that considered as the most important thing is preventing acne which is now owned by the non male brand, Clean and Clear.*

Educating male consumers that their skin is actually different with female is the main homework for all personal care companies. In order to be success on grabbing the attention from the male consumers in Indonesian urban market, some recommendations are given based on the 4P marketing mix strategies, from product, place, promotions, and price point of view. As this will also be an input to Millward Brown report for Unilever, there are some suggestions in terms of do's and don'ts for them divided by each social economic class segments.

Keywords: *outsourcing, project management, project management office.*

1. Introduction

Nowadays, there is an emerging trend of male who also concern about their looks and appearance, not in a feminine way, but more to that now they are realizing that male have different needs compare to female. Based on the "Metro Sexual Market" article, *"There were many of world class cosmetic brands starting to design face powder, moisturizer, and other skin care product which targeted specifically for male. The reason was so simple; male didn't want to use the skin care product for female because by nature, male skin is different with female. The current cosmetic product for male in America was 4.5 billion dollar and increased to 5.5 billion dollar from 2005 – 2006"* (Yuswohady, 2004)

Due to this trend, manufacturers are trying to cater the man's need by launching some personal care product (male grooming). The latest update of this trend in Indonesia can be seen on Table 1 below as the market value on this specific male grooming product has improved around 14% from 2009 to 2010. From the similar table, observed that consumers have tendency on buying more male products which seen in the household expenditure data and it is showing that the increment is 15% compared to 2009. Similar table also shows that even though they buy the male product at the similar frequency level or even slightly less, but they actually buying more volume in one occasion. They probably buy bigger pack or buying more packs.

Table 1 Nielsen's Indonesian Male Grooming Market Home Panel Data

Male Grooming	2009	2010	Growth
Indonesian market value of male grooming products	10.486 (in billion IDR)	11.897 (in billion IDR)	+13.5%
Monthly household expenditure for male grooming products	49 (in thousands IDR)	57 (in thousands IDR)	+14.9%
Monthly purchase frequency	4.7	4.5	-5.3%
Volume per trip	92.3 (in ml)	102.3 (ml)	+10.8%

Based on Table 2 below, the total growth of personal care category which about 14% from 2009 to 2010 was driven mostly by the male products (29% growth compared to female products, which only had 12% growth). Face cleanser has the biggest growth (55%) compared to other personal care categories.

Table 2 Personal Care Category Growth 2010 versus 2009

	Total Growth (%)	Male (%)	Non Male (%)
Total Personal Care	14%	29%	12%
Liquid Soap	24%	23%	24%

Face Cleanser	18%	55%	14%
Hand and Body Lotions	Na	10%	11%
Shampoo	10%	45%	10%
Cologne	15%	22%	12%

While these positive significant growth happened on the male grooming segment until 2010, there was a survey conducted by Maxus 3D Data in 2011 which stated that still almost half (41%) of the Indonesian male are currently using the facial cleanser for female. Quoted from www.kabarbisnis.com "Maxus 3D survey result shows that 41% Indonesian male are still using the female face cleanser products. This happened because they are lacking of education about face cleaning and they tend to use whatever products available at their home whereas male and female skin is actually different. Male tend to do many activities, more sweat, and the level of dirt is also higher so they actually need the specific face cleansers product". (www.kabarbisnis.com , 2011)

Relating these two contradictory facts, it seems that this will be an issue for all manufacturers which already launched the specific male products to the market because they will not accept maximum profit. One of the former Consumer Marketing Insight people of Skin Care Category in Unilever Indonesia stated that "Men's products usually have higher margin – or more premium compared to the female product" (Purwantini, 2012).

Based on those issues, there is a need to identify the current trend and male consumer's behavior towards face cleansers product and identify the key factors that facial cleanser brands must considered in order to be success with male consumers.

Literature Review

Theory of Consumer Behavior

The term of consumer behavior is defined as the behavior that consumers display in searching for, purchasing, using, evaluating, and disposing of products and services that they expect will satisfy their needs. Consumer's behavior focus on how individuals make decisions to spend their available resources (time, money, effort) on consumption related items. That includes what they buy, why they buy it, when they buy it, where they buy it, how often they buy it, how often they use it, how they evaluate it after the purchase, the impact of such evaluations on future purchases, and how they dispose of it.

One of the methods to have deeper understanding on consumer behavior is by using market segmentation. Market segmentation can be defined as the process of dividing a market into distinct subsets of consumers with common needs or characteristics and selecting one or more segments to target with a distinct marketing mix. The base of segmentation can be vary, from geographic (region, city size, density of area, climate), demographic (age, age, sex, marital status, income, education, occupation), psychological (needs motivation, personality, perception, learning involvement, attitude), psychographic (lifestyle segmentation), socio cultural (cultures, religion, race / ethnics, social class, family life cycle), use – related (usage rate, awareness status, brand loyalty), use situation (time, objective, location, person) and benefit.

The next challenge for the marketer is to select one or more segments to target with an appropriate marketing mix. The marketing mix is the set of controllable, tactical marketing tools that the firm blends to produce the response it wants in the target market. The marketing mix consists of everything the firm can do to influence the demand for its product. The many possibilities can be collected into four groups of variables known as the "four Ps" (product, place, promotions, and price).

A. Theory of Branding

In Principle of Marketing, by Phillip Kotler and Gary Armstrong, a brand is defined as "a name, term, sign symbol or a combination of these that identifies the maker or seller of the product. A brand name

helps an organization differentiate itself from its competitors" (Kotler, 2006) In today's competitive world, no product can go without a brand. Consumers often build up a relationship with a brand that they trust and will often go back to time and time again.

Brand equity is simply about how much a brand is worth, it refers to the value of the brand. Brand equity itself does not develop instantaneously. A brand needs to be carefully nurtured and marketed so consumers feel real value and trust towards that brand.

Brand name and brand strategy. Depending on how established an organization is, there are a number of ways to brand a product. As with all good marketing strategy the chances of an effective product name will be increased if the product name reflects the result of research into the market place in which it will be sold. There are a number of different ways to name a product or service such as individual name, multi branding, family / umbrella brand, etc.

Brand image. Identity and image of a brand should be distinguished. Identity is the way a company aims to identify or position itself or its product. An effective identity does three things: it establishes the product's character and value proposition, it conveys this character in a distinctive way, and it delivers emotional power beyond mental image. Brand image should be positive, unique and instant. It can be strengthened using brand communications like advertising, packaging, word of mouth publicity, other promotional tools, etc.

B. Male Market Face Cleanser Segment in Indonesia

In the context of skin care category, many FMCG personal care companies, from both local and global such as Unilever, Procter and Gamble, L'oreal, KAO, Mustika Ratu, and others, have already tapped into this male segment.

One of the examples of brand strategy and marketing aspects overview is done for Vaseline Men from Unilever. This is the new face care product which had launched in 2010. Indonesian consumers actually already aware and familiar with the brand because Vaseline known as a hand and body lotions products for female.

In terms of product, Vaseline Men has 3 types of personal care product which are face cleanser, face moisturizer, and body wash. It was using Darius Sinatria, one of the Indonesian actors, as its brand ambassador and now it has Joe Taslim as the new one. The brand is positioning itself as a premium brand, with prime TV advertising placement and premium promotional activities to support and strengthen its brand image.

Although the intention is to be a premium brand, Vaseline Men price point per 100ml is actually located at the middle of the face cleanser price range.

Table 3. Male Face Cleansers – Price Point per 100ml

Brand	Price (per 100 ml in IDR)
L'oreal Men Expert	32390
Olay Men	30900
Garnier Men	22000
Gillette for Men	21790
Vaseline Men	21250
Nivea Men	18400

2. Business Issue Exploration

Based on the background above, quantitative and qualitative research had been done to provide the entire possible problem solving options. Quantitative research part being done by distributing the questionnaire online and qualitative research was being done by doing the focus group discussion and interviewing the expert of personal care category in the context of Indonesian male market. Market observation was also being conducted in order to strengthening the findings.

C. Respondent Profile, Consumer and Brand Behavior (Quantitative)

From 38 respondents who completed the online survey, most of them come from Jakarta, 64% are SEC A (above 3 mio monthly expenditure) respondents and the rest are from SEC BC (from 1 – 3 mio monthly expenditure). The respondents' age are varying from 19 – 35 years old and mostly an employee and still single.

In terms of category penetration, most of the male respondents are using soap and shampoo, face cleanser is being used by 80% of the total respondents. Getting specific into face cleanser product, respondents claimed that their skin is actually normal to oily skin – that is why they are mostly using the regular / oil control type of facial cleansers compared to others. Around 60% respondents are using the product two to three times a day while others tend to use face cleansers once a day or even less. They are using it when they are taking a bath, some also using it after doing outdoor activities or sports. Purchase frequency is dominated by once a month period, with 100ml pack being the most pack bought by them. The large number of hypermarket in Jakarta also gives some impact to the survey result that most of respondents buy the product from hypermarket.

Coming into brand behavior, the survey result shows that Ponds, Biore Men, and L'oreal Men Expert are the top 3 brands in terms of current usage. Grouping the brand into male and non male, 60% of the total respondents are the current users of specific male brands while the rest are still using the non male one. Some indication seen that among most respondents who are currently using non male brands, they think that the current brands are effective and suitable for their skin. The rest are saying that the reason why they are using the brands is because those are the products that available at their house as well as easy to get. Overall, the reasons why male consumers choosing the brands that they currently use are because of the quality of the product, followed by the cleansing power. Elements of price and availability of the product in the store are observed more among SEC BC respondents.

D. Brand Image (Quantitative)

The survey is also conducting to measure the brand imagery perception of some male face cleanser brands which available in Indonesian market. The way the question being asked is that respondent can choose one or more brands which they think strongly related with the image statements given. Afterwards, data normalization is being done to remove the bias from the brand size because there might be a tendency for respondents to choose the brands which they are familiar with. The result of this image differentiation is shown as below:

Table 4 Summary of Brand Image Differentiation

Imagery attributes	Brands which strongly related with the imagery
Understand the needs of men	Biore Men, Gatsby, Gillette Men, Vaseline Men
Cleanse skin thoroughly	Biore Men and Vaseline Men
Preventing acne	Clean and Clear
Makes skin fresh	None of them
Control oily skin effectively	Clean and Clear, Olay Men
Suitable for all skin type	Biore Men, Ponds
Makes skin fairer	Nivea for Men, Vaseline Men, Ponds
Premium / classy brand	L'oreal Men Expert, Garnier Men, Olay Men

E. Interview with Expert and Focus Group Discussion (Qualitative)

The interview was being done with former Consumer Market Insight person from Unilever Indonesia which handled skin care category. Some points that taken from the interview are:

- Male grooming category is currently growing quite strong. It can be observed from the advertising spending (more TV advertising, more billboards, more brand activation, etc) and the changes in the supermarket aisle (more shelves are specifically built for this category).
- Face cleanser owns the highest growth across all male grooming.
- Not all of male consumers are using this specific face cleanser brand, two main reason are that the non male brands that they used already catered their skin needs and they didn't want to have some extra spending if they buy different product besides what is already there at home.
- The main task of the personal care manufacturer companies is to educating male consumers.
- Unilever Indonesia has two strategies to grow the category:
 - a. From non users who haven't used any face cleansers at all (non category users).
 - b. From those who already wash their face with body soap and or non male brands

The company next focus will be on male face moisturizer category after they are able to grow this face cleanser segment. Besides interviewing the expert, other qualitative research methodology that has been done for this study is focus group discussion (FGD). This focus group discussion was conducted to have deeper understanding on how male consumers choose the personal care brands. It was conducted on 31st August 2012 among 5 male face cleansers users. Most of the respondents are having oily – acne type of skin while the rest tend to have normal skin. In line with the quantitative results, found out that the reason they use the current brand is because it is suitable for their skin type. Some indications occur that some of them are searching for the brand which makes skin soft.

The discussion result shows that all of the respondents tried the non male brands before, which dominated by Ponds lapse users. And the main reason to try the product is basically because it is available at home. Similar findings also seen based on the interview with the CMI – Skin care of Unilever which stated that from qualitative study that they did, the first brand that men's tried is the one which being used by their sisters/mothers and available at home and those non male brands that they used were already serving their skin needs. One other reason men didn't want to switch to specific male brands is because they didn't want to have an extra spending on this. So it will be very beneficial for them to only buy one product which can be used by both of them.

The other things that being asked in the discussion are about the rank of importance of the image attributes given related to their perception towards face cleansers products. The result is shown below:

Table 5 Rank of the importance brand image attributes

Rank	Imagery Statements
1	Prevent acne
2	Cleanse skin thoroughly
3	Skin fairer
4	Promotions / availability in the market
5	Price
6	Brand endorsers

Seen that the skin benefit of preventing acne, the cleansing power are becoming the top three most important attributes which being considered by male consumers while choosing face cleansers product.

F. Crosstab of Quantitative and Qualitative Survey Result

After knowing the rank of importance, crosstab between brand image differentiation and the rank is being done to understand which brands in the market is owning the most important attributes and

vice versa – whether the consumers need already being catered by the male face cleansers brands or not.

Table 6 Crosstab Rank of Importance with Brand Image Differentiation

Rank	Imagery Statements	Brand(s) that Currently Owned the Image Statements
1	Prevent acne	Clean and Clear
2	Cleanse skin thoroughly	Biore Men and Vaseline Men
3	Skin fairer	Nivea for Men, Vaseline Men, and Ponds
5	Price	L'oreal Men Expert

From the above table, seen that most important elements on buying face cleanser products are already being catered by those male brands which available in the market. Unfortunately, the number one important elements which is preventing acne, is owned by 'Clean and Clear' which is a non male brand.

G. Market Observation

The reason behind why market observation being conducted was to understand the retail channel characteristic for male face cleansers product. The observation was done among 6 types of market, from hypermarket (Carrefour, Lotte Mart), supermarket (Hero, Superindo), independent supermarket (Santa Supermarket), minimarket (Indomaret, Alfamart), pharmacy / drugstore (Guardian), and convenience store (Seven Eleven, Circle K) all located in Jakarta.

Hypermarket offers larger base of brands as compare to other retail channel, carrying 10 male brands in one men's grooming area, while on the contrary, supermarket only carries around 6-8 brands in their shelves. In fact, minimarket actually carries more brands compare to Supermarket but the number of SKU offer is very limited. Promotions are only available in the hypermarket and the drug store and the kind of promotions are vary, depend on each retail channel. For example, in Hypermarket, the L'oreal Men Expert promotion is about the quiz while in Drug Store, the promotion for the same brand is a price discount. It also observed that the product price in hypermarket is actually the cheapest across all retail channel, even though it has only minimum promotions. The most expensive one is there on Convenience Store, followed by the Drug Store. But comparing both channels, drug store seems more attractive because it has lots of promotions happening; vary from price discount to buy one get one promo.

H. Research Key Take Out

Overall key take out is that male face cleanser is a potential market as almost 80% of the male consumers are using the product nowadays. Personal care companies with their retail channels are currently having more attention to this category by launching many brands or new variants in the market. Higher advertising spending on this category is also seen, mainly to increase the consumer's awareness.

Consumer behavior is also affected by demographic, psychological, socio-cultural, usage related and situation, and also the end benefit to the consumers. The small segmentation shows that there are some interesting differences between SEC A and SEC BC consumers.

Basically what male consumers are searching for is high quality product which suitable for their skin type, SEC BC also considering the product availability and price as well. Male tend to buy and choose the face cleansers product by themselves but open to hear any suggestions from their significant others.

SEC A preferences is generally to any brands which suitable for their skin types whereas SEC BC also considering the availability of the product as well as price. d. Brand endorser preference is also

different, while SEC A tend to find actors as their role model, SEC BC see athletes as theirs. After riding motorcycle or public transportation is also one other occasion when SEC BC consumers using the face cleansers product. Each retail channel has its own importance on attracting male consumers; hypermarket is able to attract all segments while minimarket is attracting more SEC BC consumers.

Conclusion, Recommendations, and Implementation Plan

The path of decision making process of Indonesian male consumers shown as per below figure:



Figure 1.1 Path of Decision Making Process of Male Consumers towards Face Cleanser Products

Looking into the specific usage of male versus non male brand usage, the study result shows that nowadays more and more male consumers are using specific male face cleanser brands, although the increment is not significant.

Table 7 Face Cleanser Brand Usage Comparisons

	Maxus 3D Data 2010 %	Study Result 2012 %
Male brands	59	61
Non Male brands	41	39

Observed that some reasons why male consumers are using non male face cleansers product are because the current non male brand that they use is effective and suitable for their skin, it is available at home, avoiding any extra money on buying other products (specific male brand products), they trust their significant others recommendation that the current non male brands product that they use is good enough. In terms of brand preferences, found out that Ponds, Biore Men, L'oreal Men Expert and Vaseline Men are working well in terms of brand usage as resulted in the study. Biore Men as a brand which understand the needs of men, cleanse skin thoroughly, and suitable for all skin type. Vaseline Men as a brand which understand the needs of men, cleanse skin thoroughly, and makes skin fairer while L'oreal Men Expert, Garnier Men, and Olay Men are strongly perceived as a premium & classy brand. Preventing acne is considered as the most important element on choosing face cleanser brands and currently it is owned by Clean and Clear which is a non male brand.

In order to successfully grabbing the attention from Indonesian male consumers, educating them that their skin has different needs compared to woman still the main homework at the current stage. Some recommendations being offered for the personal care companies using 4Ps marketing strategy approach are as below:

A. Product:

As preventing acne considered the most important attribute that a face cleanser's product must owned, ensuring that companies at least having this benefit offered will be one crucial point. If the company already had this 'prevent acne' benefit offered from one of their products, then the next stage is to differentiate the benefit by introducing new formula / new product ingredients. Having 100ml pack will be important as this is the most famous pack size being bought by consumers

B. Place:

Monitoring the stocks on hypermarket will be very crucial especially in the urban cities area. The stock availability in minimarket is also important to target SEC BC (lower expenditure class) consumers.

C. Promotions:

Companies have to communicate product quality and product benefit in their promotions materials. Actively doing the attractive in store promotions (free sampling / bundling / price discounts etc) and other below the line activities to increase brand awareness, induce trial and creating buzz. Recommendation from significant others (mothers / spouse / sisters / girlfriends) considered as one important thing which affect the decision making process of choosing face cleanser products. So the marketing communication can be done to both male / female, not necessary specific among male only, depend on the brand strategy. TV advertising quality and amount of spend are important for connecting with target consumers, as many companies are heavily support their face cleanser brands on TV. Right celebrity endorsements will also affecting the interest of consumers to buy the product.

D. Price:

As currently many companies are playing in IDR. 15,000 – 25,000 price range, the price of the new face cleansers product must also remain reasonable, otherwise customers might switch to other brands.

In order to gives some additional inputs for Unilever, some implementation that can be done from this study results – connecting with the current company's situation will be as below:

I. To SEC A consumers:

Some DO's: Keeping the good momentum by growing up the distribution level in specifically in modern trade; prominent below the line activities to create consumer awareness and buzz; maximizing social media channel beside TV; maximizing the other skin care category product such as body wash and moisturize; and building stronger differentiation on premium brand as now it is still owned by L'oreal Men Expert, Garnier Men, and Olay Men.

Some DON'T's: Lesser spend on TV because TV is still the main source of consumer awareness; lesser presence on in store; and changing the brand endorser to more 'mass' talent because it will give some impact to the overall brand positioning and differentiation.

J. To SEC BC consumers:

Some DO's: Strong distribution is needed so that the product is accessible, available in both urban and rural area; in both modern and general trade; competing with Clean and Clear on "preventing acne" differentiation; using famous talent as a brand endorser; strong advertising spending on TV to increase awareness; and if choosing Ponds male, need further deep dive study on the impact towards Ponds female.

Some DON'T's: Lesser spend on TV because TV is still the main source of consumer awareness; lesser presence on in store; and playing at the same price point as Vaseline Men's.

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